IEP Meeting Checklist

IEP & 504 Support · PreK–12

Prepare for IEP meetings, confirm participants, gather student data, and track implementation, progress, and follow-up.

Meeting Preparation

- [ ] Confirm the meeting date, time, location, and format with the case manager.
- [ ] Check that meeting notice was sent according to district procedures and timelines.
- [ ] Review the current IEP, including goals, services, and accommodations.
- [ ] Clarify the meeting's purpose, such as annual review, re-evaluation, or amendment.
- [ ] Arrange interpreter or translation services if the family needs them.
- [ ] Prepare an agenda and share it with the team in advance when appropriate.

Required Participants

- [ ] Confirm required team members will attend, following your district's procedures.
- [ ] Invite the student when appropriate, especially when transition planning is discussed.
- [ ] Confirm a district representative and someone who can interpret evaluation results will attend.
- [ ] Follow district procedures for excusing team members who cannot attend.
- [ ] Invite related service providers whose services will be discussed.

Student Data & Information

- [ ] Gather recent progress-monitoring data for each annual goal.
- [ ] Collect work samples that show current skills and growth.
- [ ] Summarize classroom observations and how current accommodations are working.
- [ ] Note the student's strengths, interests, and preferences.
- [ ] Review relevant assessment results with authorized team members.

During the Meeting

- [ ] Begin by sharing the student's strengths.
- [ ] Invite family input and questions throughout the meeting.
- [ ] Use data to discuss proposed goals, services, and accommodations.
- [ ] Record decisions, open questions, and follow-up items.
- [ ] Confirm who is responsible for each action and by when.

Implementation & Follow-Up

- [ ] Follow district procedures for finalizing and distributing the IEP.

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- [ ] Share accommodations only with staff who work with the student, protecting confidentiality.
- [ ] Implement accommodations and services as written in the student's plan.
- [ ] Schedule progress-monitoring and progress-reporting dates.
- [ ] File meeting notes and documentation securely.
- [ ] Follow up with the family on any open questions.
- [ ] Review how the plan is working well before the next scheduled review.

A general organizational tool. It does not replace legal requirements, your district's procedures, or individualized decisions made by the IEP team. Requirements vary by state and district, and supports are decided for each student individually.

Notes